Getting
Started with Excel 2002

Objectives

- ▶ **Define spreadsheet software**
- ▶ **Start Excel 2002**
- ▶ **View the Excel window**
- MOUS ▶ **Open and save a workbook**
- MOUS ▶ **Enter labels and values**
- MOUS ▶ **Name and move a sheet**
- MOUS ▶ **Preview and print a worksheet**
- ▶ **Get Help**
- ▶ **Close a workbook and exit Excel**

In this unit, you will learn how to start Microsoft Excel 2002 and identify elements in the Excel window. You will also learn how to open and save existing files, enter data in a worksheet, manipulate worksheets, and use the extensive Help system.   Jim Fernandez is the office manager at MediaLoft, a nationwide chain of bookstore cafés selling books, CDs, DVDs, and videos. MediaLoft cafés sell coffee and pastries. Jim wants you to help him use Excel to analyze a worksheet summarizing budget information for the MediaLoft Café in the New York City store.

Defining Spreadsheet Software

Microsoft Excel is an electronic spreadsheet program that runs on Windows computers. You use an **electronic spreadsheet** to produce professional-looking documents that perform numeric calculations rapidly and accurately. These calculations are updated automatically so that accurate information is always available. See Table A-1 for common ways spreadsheets are used in business. The electronic spreadsheet that you produce when using Excel is also referred to as a **worksheet**. Individual worksheets are stored within a **workbook,** which is a file with the .xls file extension. Each new workbook contains three worksheets. ▰▰▰▰ Jim uses Excel extensively to track MediaLoft finances. Figure A-1 shows a budget worksheet that Jim created using pencil and paper, while Figure A-2 shows the same worksheet Jim created using Excel.

Details

The advantages of using Excel include:

► Enter data quickly and accurately

With Excel, you can enter information faster and more accurately than with pencil and paper. For example, in the MediaLoft NYC Café budget, certain expenses, such as rent, cleaning supplies, and products supplied on a yearly contract (coffee, creamers, sweeteners), remain constant for the year. You can copy the expenses that don't change from quarter to quarter, and then use Excel to calculate Total Expenses and Net Income for each quarter by supplying the data and formulas.

► Recalculate data easily

Fixing typing errors or updating data using Excel is easy, and the results of a changed entry are recalculated automatically. For example, if you receive updated expense figures for Quarter 4, you enter the new numbers and Excel recalculates the worksheet.

► Perform a what-if analysis

The Excel ability to change data and let you quickly view the recalculated results makes it a powerful decision-making tool. For instance, if the salary budget per quarter is increased to $14,500, you can enter the new figure into the worksheet and immediately see the impact on the overall budget. Any time you use a worksheet to ask the question "what if?" you are performing a **what-if analysis**.

► Change the appearance of information

Excel provides powerful features for making information visually appealing and easy to understand. For example, you can use boldface type and colored or shaded text headings or numbers to emphasize important worksheet data and trends.

► Create charts

Excel makes it easy to create charts based on worksheet information. Charts are updated automatically as data changes. The worksheet in Figure A-2 includes a 3-D pie chart that shows the distribution of the budget expenses for the MediaLoft NYC Café.

► Share information with other users

Because everyone at MediaLoft is now using Microsoft Office, it's easy for them to share worksheet data. For example, you can complete the MediaLoft budget that your manager started creating in Excel. Simply access the files you need or want to share through the network or from a disk, or through the use of online collaboration tools (such as intranets and the Internet), and then make any changes or additions.

► Create new worksheets from existing ones quickly

It's easy to take an existing Excel worksheet and quickly modify it to create a new one. When you are ready to create next year's budget, you can open the file for this year's budget, save it with a new filename, and use the existing data as a starting point. An Excel file can also be created using a special format called a **template**, which lets you open a new file based on an existing workbook's design and/or content. Office comes with many prepared templates you can use.

FIGURE A-1: Traditional paper worksheet

MediaLoft NYC Café Budget

	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total
Net Sales	56,000	84,000	72,000	79,000	291,000
Expenses					
Salary	14,500	14,500	14,500	14,500	58,000
Rent	4,000	4,000	4,000	4,000	16,000
Advertising	3,750	8,000	3,750	3,750	19,250
Cleansers	1,500	1,500	1,500	1,500	6,000
Pastries	2,500	2,500	2,500	2,500	10,000
Milk/Cream	1,000	1,000	1,000	1,000	4,000
Coffee/Tea	4,700	4,750	4,750	4,750	18,950
Sweeteners	300	300	300	300	1,200
Total Expenses	32,250	36,550	32,300	32,300	133,400
Net Income	23,750	47,450	39,700	46,700	157,600

FIGURE A-2: Excel worksheet

Office Assistant provides help when needed
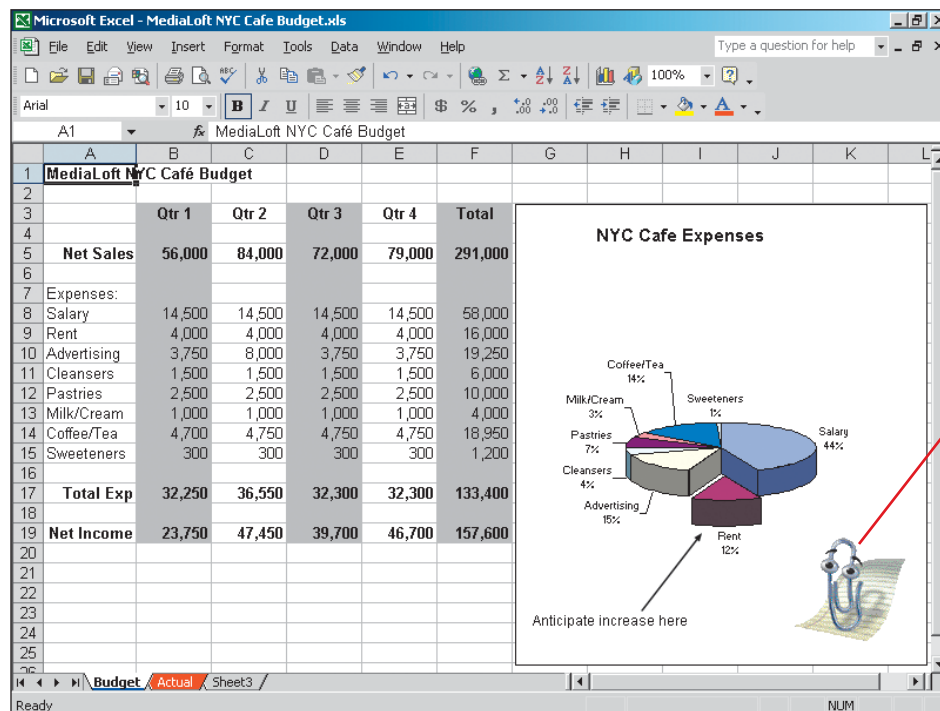
TABLE A-1: Common business uses for electronic spreadsheets

spreadsheets are used to	by
Maintain values	Calculating numbers
Represent values graphically	Creating charts based on worksheet figures
Create consecutively numbered pages using multiple workbook sheets	Printing reports containing workbook sheets
Organize data	Sorting data in ascending or descending order
Analyze data	Creating data summaries and short-lists using PivotTables or AutoFilters
Create what-if data scenarios	Using variable values to investigate and sample different outcomes

Starting Excel 2002

To start any Windows program, you use the Start button on the taskbar. A slightly different procedure might be required for computers on a network and those that use Windows-enhancing utilities. If you need assistance, ask your instructor or technical support person. Jim is ready to begin work on the budget for the MediaLoft Café in New York City. He begins by starting Excel.

Steps 1 2 3 4

1. Point to the **Start button** on the taskbar

The Start button is on the left side of the taskbar. You use it to start programs on your computer.

2. Click

Microsoft Excel is located in the Programs folder, which is at the top of the Start menu, as shown in Figure A-3.

3. Point to **Programs**

The Programs menu opens. All the programs on your computer, including Microsoft Excel, are listed on this menu. See Figure A-4. Your program menu might look different, depending on the programs installed on your computer.

4. Click the **Microsoft Excel program icon** on the Programs menu

Excel opens and a blank worksheet appears. In the next lesson, you will learn about the elements of the Excel worksheet window.

5. If necessary, click the **Maximize button** on the title bar

Trouble?

If you don't see the Microsoft Excel icon, see your instructor or technical support person.

Click here to
open Start menu

Microsoft Excel
located in this
folder

Excel 2002

Microsoft Excel
program icon

Your Programs
menu might
differ
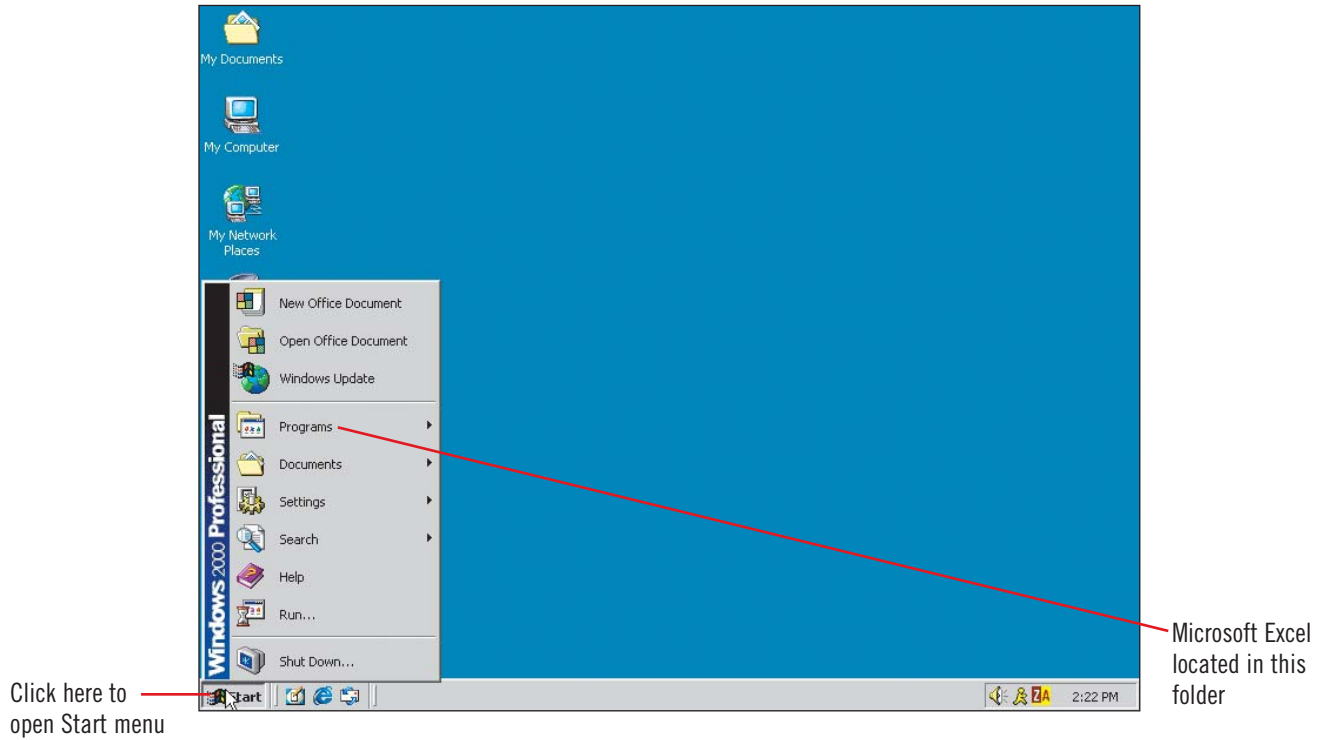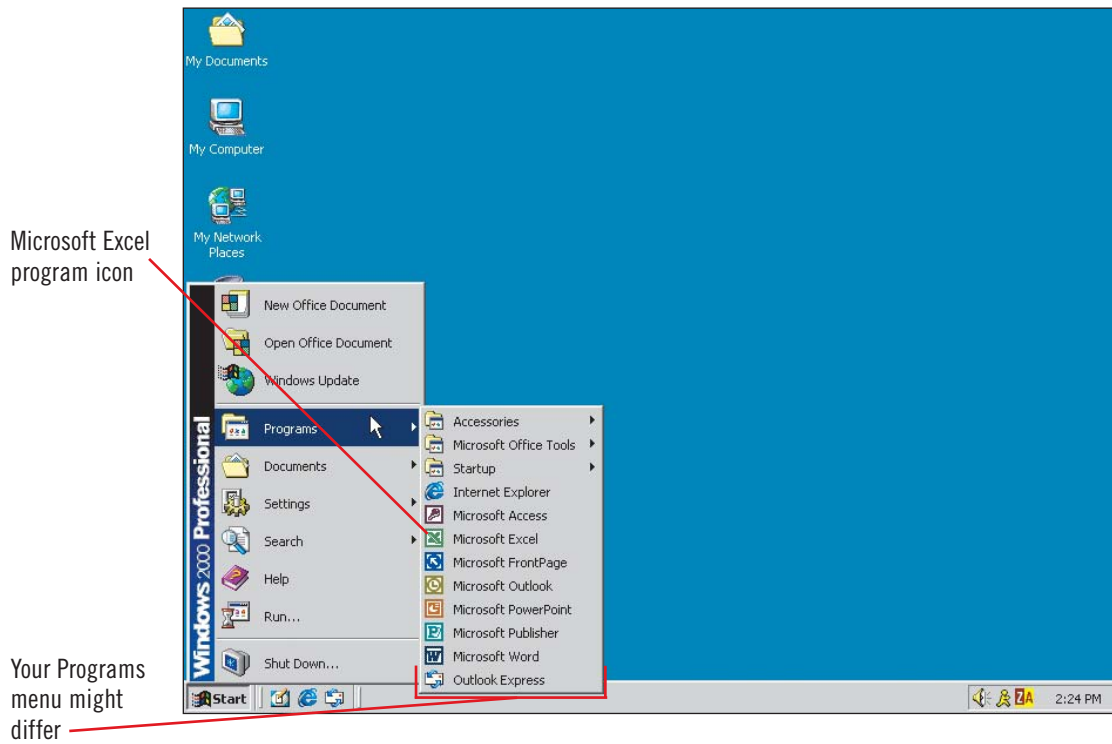
Viewing the Excel Window

When you start Excel, the **worksheet window** appears on your screen. The worksheet window includes the tools that enable you to create and work with worksheets. Jim needs to familiarize himself with the Excel worksheet window and its elements before he starts working with the budget worksheet. Compare the descriptions below to the elements shown in Figure A-5.
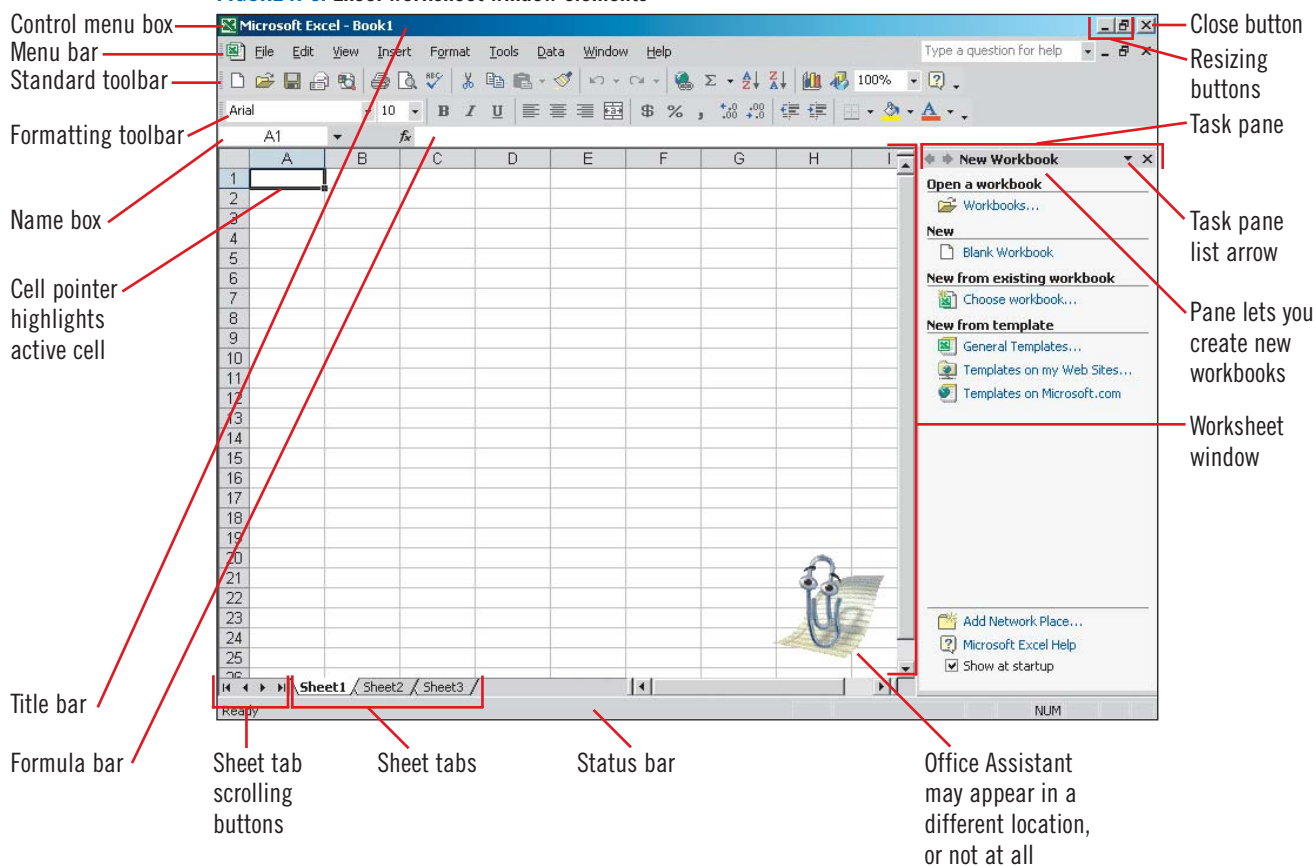
Details

► The **worksheet window** contains a grid of columns and rows. Columns are labeled alphabetically (A, B, C, etc.) and rows are labeled numerically (1, 2, 3, etc.). The worksheet window displays only a small fraction of the whole worksheet, which has a total of 256 columns and 65,536 rows. The intersection of a column and a row is called a **cell**. Cells can contain text, numbers, formulas, or a combination of all three. Every cell has its own unique location or **cell address**, which is identified by the coordinates of the intersecting column and row. For example, the cell address of the cell in the upper-left corner of a worksheet is A1. The **new workbook pane** appears to the right of the worksheet window and lets you quickly open new or existing workbooks. The **Task pane list arrow** lets you display other panes.

► The **cell pointer** is a dark rectangle that outlines the cell you are working in. This cell is called the **active cell**. In Figure A-5, the cell pointer is located at A1, so A1 is the active cell. The column and row headings for the active cell are purple; inactive column and row headings are gray. To activate a different cell, just click any other cell or press the arrow keys on your keyboard to move the cell pointer elsewhere.

► The **title bar** displays the program name (Microsoft Excel) and the filename of the open worksheet (in this case the default filename, Book1). As shown in Figure A-5, the title bar also contains a control menu box, a Close button, and resizing buttons, which are common to all Windows programs.

► The **menu bar** contains menus from which you choose Excel commands. As with all Windows programs, you can choose a menu command by clicking it with the mouse pointer or by pressing [Alt] plus the underlined letter in the menu command name. When you click a menu, only a short list of commonly used commands may appear at first; you can wait or click the double arrows at the bottom of the menu to see expanded menus with more commands.

► The **name box** displays the active cell address. In Figure A-5, "A1" appears in the name box, indicating that A1 is the active cell.

► The **formula bar** allows you to enter or edit data in the worksheet.

► The **toolbars** contain buttons for frequently used Excel commands. The **Standard toolbar** is located just below the menu bar and contains buttons that perform actions within the worksheet. The **Formatting toolbar**—beneath the Standard toolbar—contains buttons that change the worksheet's appearance. Each button contains an image representing its function. For instance, the Print button contains an image of a printer. To choose any button, click it with the left mouse button.

► **Sheet tabs** below the worksheet grid let you keep your work in a collection called a **workbook**. Each workbook contains three worksheets by default and can contain a maximum of 255 sheets. Sheet tabs allow you to name your worksheets with meaningful names. **Sheet tab scrolling buttons** help you display hidden worksheets.

► The **status bar** is located at the bottom of the Excel window. The left side of the status bar provides a brief description of the active command or task in progress. The right side of the status bar shows the status of important keys such as [Caps Lock] and [Num Lock].

FIGURE A-5: Excel worksheet window elements

Control menu box
Menu bar
Standard toolbar
Formatting toolbar
Name box
Cell pointer highlights active cell
Title bar
Formula bar
Sheet tab scrolling buttons
Sheet tabs
Status bar

Close button
Resizing buttons
Task pane
Task pane list arrow
Pane lets you create new workbooks
Worksheet window
Office Assistant may appear in a different location, or not at all

Microsoft Excel - Book1
File Edit View Insert Format Tools Data Window Help
Type a question for help

Arial   10

A1

New Workbook
Open a workbook
 Workbooks...
New
 Blank Workbook
New from existing workbook
 Choose workbook...
New from template
 General Templates...
 Templates on my Web Sites...
 Templates on Microsoft.com

Add Network Place...
Microsoft Excel Help
Show at startup

Sheet1 Sheet2 Sheet3
Ready   NUM

CLUES TO USE

Working with toolbars and menus in Excel 2002

Although you can configure Excel so that your toolbars and menus modify themselves to conform to your working style, the lessons in this book assume you have turned off personalized menus and toolbars and are working with all menu commands and toolbar buttons displayed. When you use personalized toolbars, the Standard and Formatting toolbars appear on the same row and display only the most frequently used buttons, as shown in Figure A-6. To use a button that is not visible on a toolbar, you click the Toolbar Options button [»] at the end of the toolbar, then click the button on the Toolbar Options list. As you work, Excel adds the buttons you use to the visible toolbars and drops the buttons you don't often use to the Toolbar Options list. Similarly, Excel menus adjust to your work habits, so that the commands you use most often appear on shortened menus. You can see all the menu commands by clicking the double arrows at the bottom of a menu. It is often easier to work with full toolbars and menus displayed. To turn off personalized toolbars and menus, click Tools on the menu bar, click Customize, on the Options tab select the Show Standard and Formatting toolbars on two rows and Always show full menus check boxes, and then click Close. The Standard and Formatting toolbars appear on separate rows and display all the buttons, and the menus display the complete list of menu commands. (You can quickly display the toolbars on two rows by clicking a Toolbar Options button and then clicking Show Buttons on Two Rows.)

FIGURE A-6: Toolbars in one row

Arial   10

Toolbar options buttons
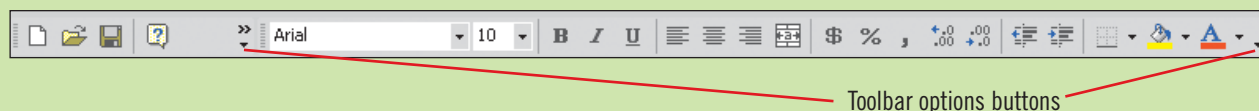
Opening and Saving a Workbook

Sometimes it's more efficient to create a new worksheet by modifying one that already exists. This saves you from having to retype information from previous work. Throughout this book, you will create new workbooks by opening a file from the location where your Project Files are stored, using the Save As command to create a copy of the file with a new name, and then modifying the new file by following the lesson steps. Use the Save command to store changes made to an existing file. It is a good idea to save your work every 10 or 15 minutes and before printing. Saving the files with new names keeps your original Project Files intact, in case you have to start the unit over again or you wish to repeat an exercise. ✒️ Jim wants you to complete the New York City MediaLoft Café budget that a member of the accounting staff has been working on.

Steps 1 2 3 4

QuickTip

You can also click the Open button 📂 on the Standard toolbar.

1. Click **More Workbooks** in the New Workbook task pane

The Open dialog box opens. See Figure A-7. If no workbooks have been opened on your computer, the command will read "Workbooks."

QuickTip

If you don't see the three-letter extension .xls on the filenames in the Open dialog box, don't worry. Windows can be set up to display or not to display the file extensions.

2. Click the **Look in list arrow**, then click the drive and folder where your Project Files are located

The Look in list arrow lets you navigate to folders and disk drives on your computer. A list of your Project Files appears in the Open dialog box.

3. Click the file **EX A-1**, then click **Open**

The workbook file EX A-1 opens. The new workbook pane no longer appears.

QuickTip

You can create a new folder from within the Save As dialog box by clicking 📁 on the dialog box toolbar, typing a name in the Name text box, then clicking OK. To open a file from a folder you create, double-click folders or use the Look in list arrow in the Open dialog box to open the folder, click the filename, then click Open.

4. Click **File** on the menu bar, then click **Save As**

The Save As dialog box opens, displaying the drive where your Project Files are stored.

5. In the File name text box, select the current filename (if necessary), type **MediaLoft Cafe Budget**, as shown in Figure A-8, then click **Save**

Both the Save As dialog box and the file EX A-1 close, and a duplicate file named MediaLoft Cafe Budget opens, as shown in Figure A-9. The Office Assistant may or may not appear on your screen.

CLUES TO USE

Creating a new workbook

You can create your own worksheets from scratch by opening a new workbook. To create a new workbook, click the New button ▢ on the Standard toolbar. You can also use the New Workbook pane (located on the right side of the scre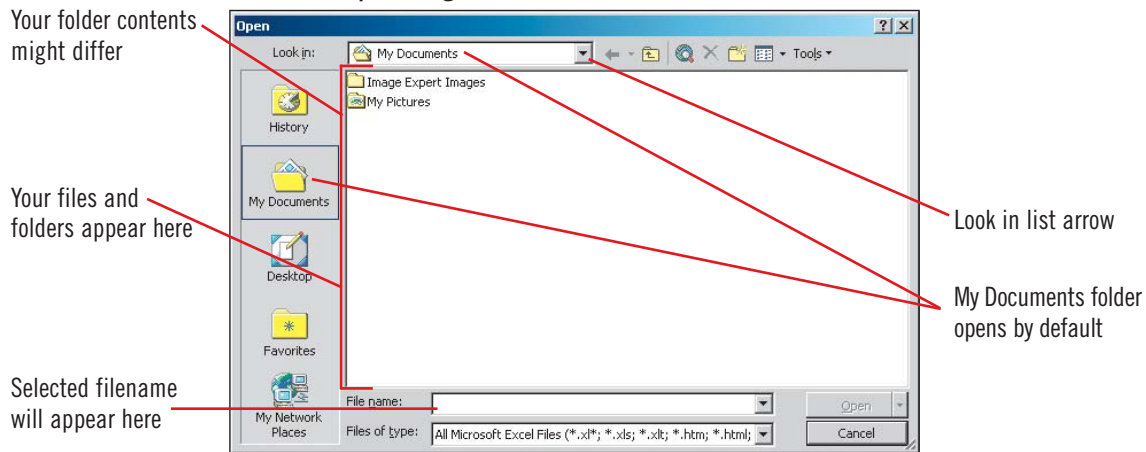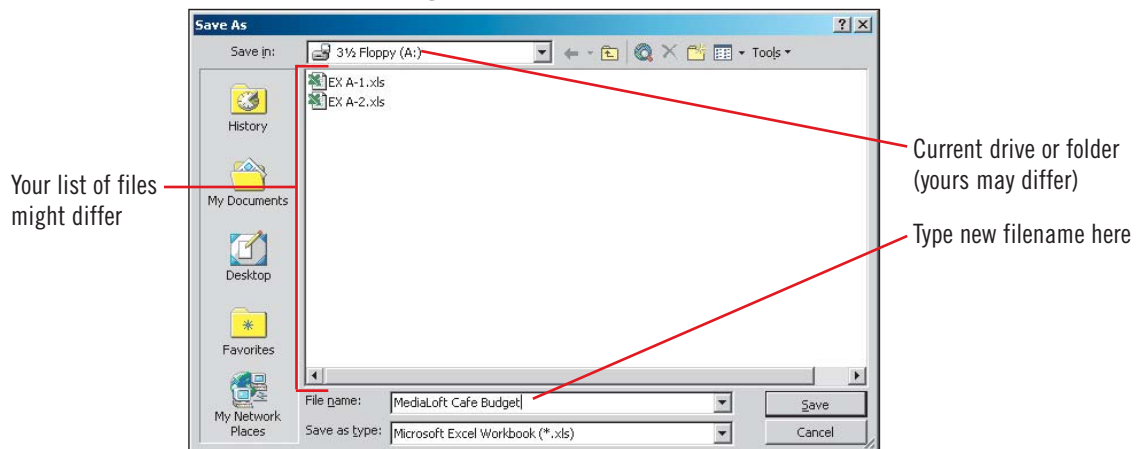en) to open a new file. Click the Blank Workbook button ▢ in the New Workbook pane, and a new workbook will open. Each new workbook automatically contains 3 sheets, although you can insert as many as you need.

FIGURE A-7: Open dialog box

Your folder contents might differ

Your files and folders appear here

Selected filename will appear here

Look in list arrow

My Documents folder opens by default

FIGURE A-8: Save As dialog box

Your list of files might differ

Current drive or folder (yours may differ)

Type new filename here

FIGURE A-9: MediaLoft Café Budget workbook

Purple column and row headers define active cell

	A	B	C	D	E	F	G
1	MediaLoft NYC Café Budget					Projected Expenses	
2							
3		Qtr 1	Qtr 2	Qtr 3	Qtr 4		
4							
5	Net Sales	56000	84000	72000	79000		
6							
7	Expenses:						
8		14500	14500				
9		4000	4000				
10		3750	8000				
11	Cleansers	1500	1500				
12	Pastries	2500	2500				
13	Milk/Cream	1000	1000				
14	Coffee/Tea	4700	4750				
15	Sweeteners	300	300				

CLUES TO USE

Opening a workbook using a template

You can create a workbook by entering data and formats into a blank workbook, or you can use predesigned workbooks called templates that are included with Excel. Templates let you automatically create workbooks such as balance sheets, expense statements, loan amortizations, sales invoices, or timecards. Templates save you time because they contain labels, values, formulas, and formatting. To open a new document based on a template, click General Templates from the New Workbook task pane, save it under a new name, then add your own information. You may need to have the Office CD available to install the templates.

Entering Labels and Values

Labels help you identify the data in worksheet rows and columns, making your worksheet more readable and understandable. Try to enter all labels in your worksheet before entering the data. Labels can contain text and numerical information not used in calculations, such as dates, times, or addresses. Labels are left-aligned by default. **Values**, which include numbers, formulas, and functions, are used in calculations. Excel recognizes an entry as a value when it is a number or begins with special symbols: +, -, =, @, #, or $. Because Excel treats labels and values differently, you can have a label such as '2003 Sales' without affecting values used in a totals column. All values are right-aligned by default. When a cell contains both text and numbers it is not a valid formula; Excel recognizes the entry as a label. Jim wants you to enter labels identifying the rest of the expense categories, and the values for Qtr 3 and Qtr 4 into the MediaLoft Café Budget worksheet.

Steps

1. Click cell **A8** to make it the active cell

   Notice that the cell address A8 appears in the name box. As you work, the mouse pointer takes on a variety of appearances, depending on where it is and what Excel is doing. Table A-2 lists and identifies some mouse pointers. The labels in cells A8:A15 identify the expenses.

2. Type **Salary**, as shown in Figure A-10, then click the **Enter button** ✓ on the formula bar

   As you type, the word "Enter" appears in the status bar. Clicking the Enter button indicates that you are finished typing or changing your entry, and the word "Ready" appears in the status bar. Because the cell is still selected, its contents still appear in the formula bar. You can also confirm a cell entry by pressing [Enter], [Tab], or one of the keyboard arrow keys. These three methods also select an adjacent cell. To confirm an entry and leave the same cell selected, you can press [Ctrl][Enter]. If a label does not fit in a cell, Excel displays the remaining characters in the next cell to the right, as long as it is empty. Otherwise, the label is **truncated**, or cut off.

3. Click cell **A9**, type **Rent**, press **[Enter]** to confirm the entry and move the cell pointer to cell A10, type **Advertising** in cell A10, then press **[Enter]**

   The remaining expense values have to be added to the worksheet.

4. Click cell **D8**, press and hold down the left mouse button, drag ✛ to cell **E8** then down to cell **E15**, then release the mouse button

   You have selected a **range**, which is two or more adjacent cells. The active cell is still cell D8, and the cells in the range are shaded in purple.

5. Type **14500**, press **[Enter]**, type **4000** in cell D9, press **[Enter]**, type **3750** in cell D10, press **[Enter]**, type **1500** in cell D11, press **[Enter]**, type **2500** in cell D12, press **[Enter]**, type **1000** in cell D13, press **[Enter]**, type **4750** in cell D14, press **[Enter]**, type **300** in cell D15, then press **[Enter]**

   You will often enter data in multiple columns and rows; selecting a range makes working with data entry easier because pressing [Enter] makes the next cell in the range active. You have entered all the values in the Qtr 3 column, as shown in Figure A-11. The cell pointer is now in cell E8.

6. Using Figure A-11 as a guide, type the remaining values for cells E8 through E15

   Before confirming a cell entry, you can click the Cancel button on the formula bar or press [Esc] to cancel or delete the entry. Notice that the AutoCalculate area in the status bar displays "Sum=64550," which is the sum of the figures in the selected range. This sum changes if you change any of the numbers in the selected range.

7. Click cell **D8**, type **14550**, press **[Enter]**, then select cells **D8:E15**

   Notice that the AutoCalculate area in the status bar now says "Sum=64600".

8. Press **[Ctrl][Home]** to return to cell A1

9. Click the **Save button** 💾 on the Standard toolbar

   You can also press [Ctrl][S] to save a worksheet.

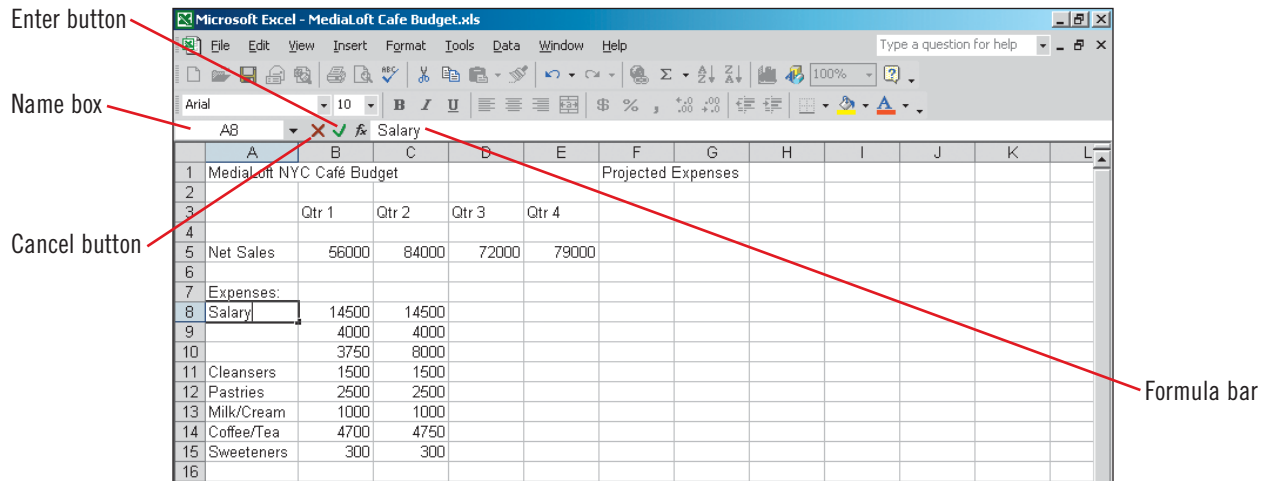FIGURE A-10: Worksheet with first label entered

Enter button

Name box

Cancel button

Formula bar

FIGURE A-11: Worksheet with new labels and values

Type these values

Labels entered

Values entered
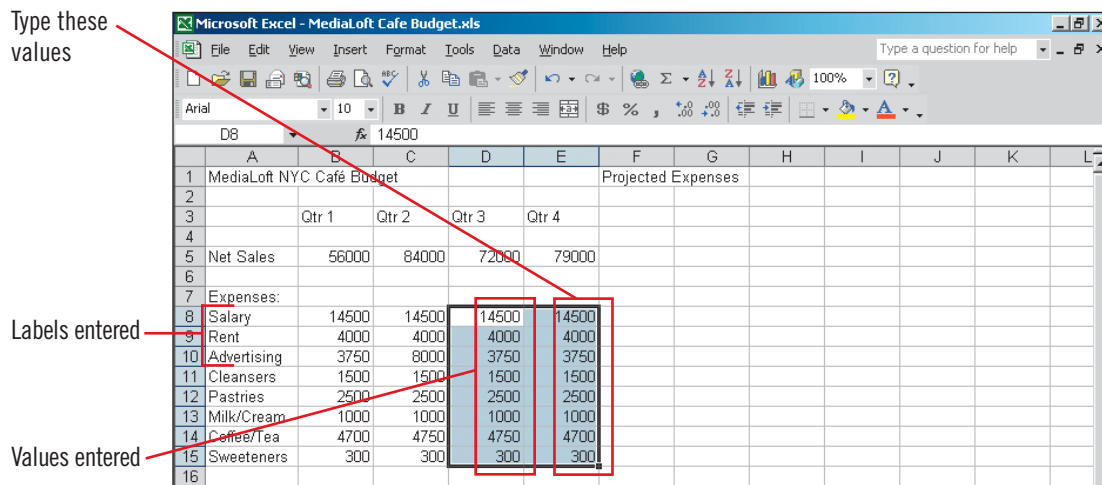
TABLE A-2: Commonly used pointers

name	pointer	use to
Normal	✛	Select a cell or range; indicates Ready mode
Copy	⬉⁺	Create a duplicate of the selected cell(s)
Fill handle	➕	Create an alphanumeric series in a range
I-beam	I	Edit contents of formula bar
Move	⬌	Change the location of the selected cell(s)

CLUES TO USE

Navigating a worksheet

With over a million cells available to you, it is important to know how to move around, or **navigate**, a worksheet. You can use the arrow keys on the keyboard ([↑] [↓] [←] or [→]) to move a cell or two at a time, or use [Page Up] or [Page Down] to move a screenful at a time. To move a screen to the left press [Alt][Page Up]; to move a screen to the right press [Alt][Page Down]. You can also use the mouse pointer to click the desired cell. If the desired cell is not visible in the worksheet window, use the scroll bars or the Go To command on the Edit menu to move the location into view. To return to the first active cell in a worksheet, click cell A1, or press [Ctrl][Home].

Naming and Moving a Sheet

Each workbook initially contains three worksheets, named Sheet1, Sheet2, and Sheet3. When you open a workbook, the first worksheet is the active sheet. To move from sheet to sheet, you can click any sheet tab at the bottom of the worksheet window. The sheet tab scrolling buttons, located to the left of the sheet tabs, allow you to display hidden sheet tabs. To make it easier to identify the sheets in a workbook, you can rename each sheet, add color to the tabs, and then organize them in a logical way. The sheet name appears on the sheet tab. For instance, to better track performance goals, you could name each workbook sheet for an individual salesperson; then you could move the sheets so they appeared in alphabetical order. ✎ Jim wants to be able to easily identify the actual expenses and the projected expenses. He wants you to name two sheets in his workbook, add color to distinguish them, then change their order.

Steps 1 2 3 4

1. Click the **Sheet2 tab**

   Sheet2 becomes active; this is the worksheet that contains the actual quarterly expenses. Its tab moves to the front, and Sheet1 moves to the background.

2. Click the **Sheet1 tab**

   Sheet1, which contains the projected expenses, becomes active again. Once you have confirmed which sheet is which, you can assign them each a name that you can easily remember.

QuickTip

You can also rename a sheet by right-clicking the tab, clicking Rename, typing the new name, then pressing [Enter].

3. Double-click the **Sheet2 tab**

   Sheet 2 becomes the active sheet with the default sheet name ("Sheet2") selected.

4. Type **Actual**, then press **[Enter]**

   The new name automatically replaces the default name in the tab. Worksheet names can have up to 31 characters, including spaces and punctuation.

5. Right-click the **Actual tab**, then click **Tab Color**

   The Format Tab Color dialog box appears, as shown in Figure A-12.

QuickTip

To delete a worksheet, select the worksheet you want to delete, click Edit on the menu bar, then click Delete sheet. To insert a worksheet, click Insert on the menu bar, then click Worksheet.

6. Click the color **red** (first column, third row), click **OK**, double-click the **Sheet1 tab**, type **Projected**, then press **[Enter]**

   Notice that when you renamed Sheet1, the color of the entire Actual tab changed to red. Jim decides to rearrange the order of the sheets, so that Actual comes before Projected.

7. Click the **Actual sheet tab** and hold down the mouse button, then drag it to the left of the **Projected sheet tab**

   As you drag, the pointer changes to �k, the sheet relocation pointer, and a small, black triangle shows its position. See Figure A-13. The first sheet in the workbook is now the Actual sheet. When you have more worksheets than can appear at once, click the leftmost tab scrolling button to display the first sheet tab; click the rightmost navigation button to display the last sheet tab. The left and right buttons move one sheet in their respective directions.

8. Click the **Projected sheet tab**, enter your name in cell **A20**, then press **[Ctrl][Home]**

   Your name identifies your worksheet as yours, which is helpful if you are sharing a printer.

9. Click the **Save button** 🖫 on the Standard toolbar
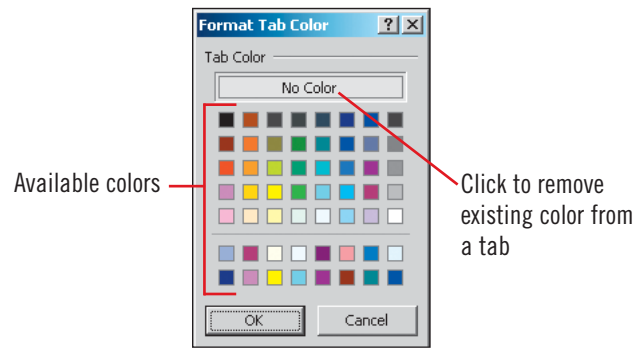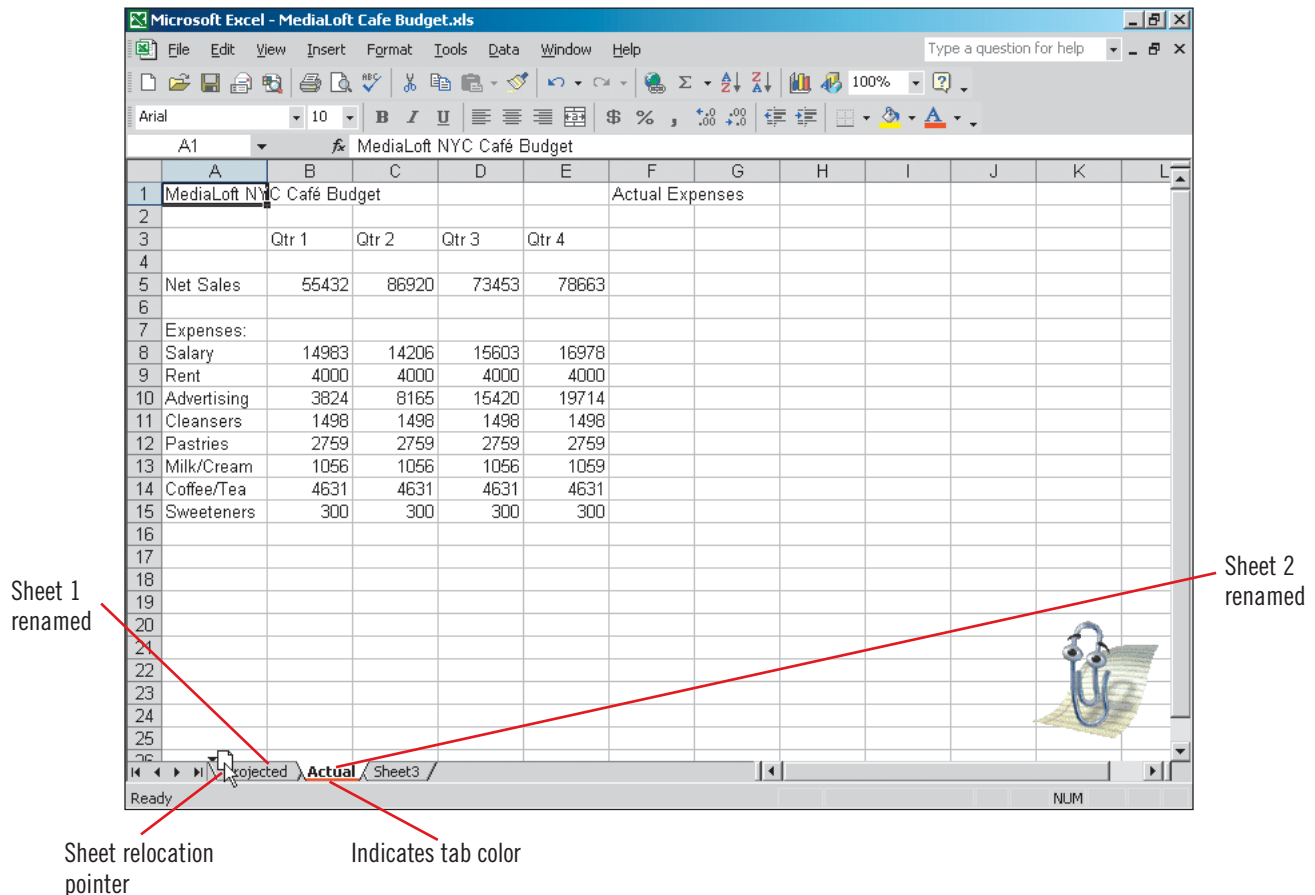
FIGURE A-12: Format Tab Color dialog box

Available colors

Click to remove existing color from a tab

FIGURE A-13: Moving Actual sheet before Projected sheet

Sheet 1 renamed

Sheet 2 renamed

Sheet relocation pointer

Indicates tab color

Copying worksheets

There are times when you may want to copy a worksheet. To copy it, press [Ctrl] as you drag the sheet tab and release the mouse button before you release [Ctrl]. You can also move and copy worksheets between workbooks. You must have the workbook that you are copying to, as well as the workbook that you are copying from, open. Select the sheet to copy or move, click Edit on the menu bar, then click Move or Copy sheet. Complete the information in the Move or Copy dialog box. Be sure to click the Create a Copy check box if you are copying rather than moving the worksheet. Carefully check your calculation results whenever you move or copy a worksheet.

Previewing and Printing a Worksheet

After you complete a worksheet, you may want to print it to have a paper copy for reference or to give to others. You can also print a worksheet that is not complete to review your work when you are not at a computer. Before you print a worksheet, you should save any changes. That way, if anything happens to the file as it is being sent to the printer, you will have your latest work saved. Then you should preview it to make sure it will fit on a page the way you want. When you **preview** a worksheet, you see a copy of the worksheet exactly as it will appear on paper. See Table A-3 for a summary of printing tips. ✎ Jim is finished entering the labels and values into the MediaLoft Café budget. He has already saved his changes, so he asks you to preview and print a copy of the worksheet he can review on the way home.

Steps 1234

1. Make sure the printer is on and contains paper

If a file is sent to print and the printer is off, an error message appears.

2. Click the **Print Preview button** 🔍 on the Standard toolbar

A miniature version of the worksheet appears on the screen, as shown in Figure A-14. If your worksheet requires more than one page, you could click the Next button or the Previous button to move between pages. Because your worksheet is only one page, the Next and Previous buttons are dimmed.

QuickTip

To print the worksheet using existing settings without previewing it, click 🖨 on the Standard toolbar.

3. Click **Print**

The Print dialog box opens, as shown in Figure A-15.

4. Make sure that the **Active Sheet(s) option button** is selected in the Print what section and that **1** appears in the Number of copies text box in the Copies section

Adjusting the value in the Number of copies text box enables you to print multiple copies. You could also print a selected range by clicking the Selection option button.

QuickTip

After previewing or printing a worksheet, dotted lines appear on the screen indicating individual page breaks in the printout. Page break positions vary with each printer.

5. Click **OK**

A Printing dialog box appears briefly while the file is sent to the printer. Note that the dialog box contains a Cancel button. You can use it to cancel the print job provided you can catch it before the file is sent to the printer.

TABLE A-3: Worksheet printing tips

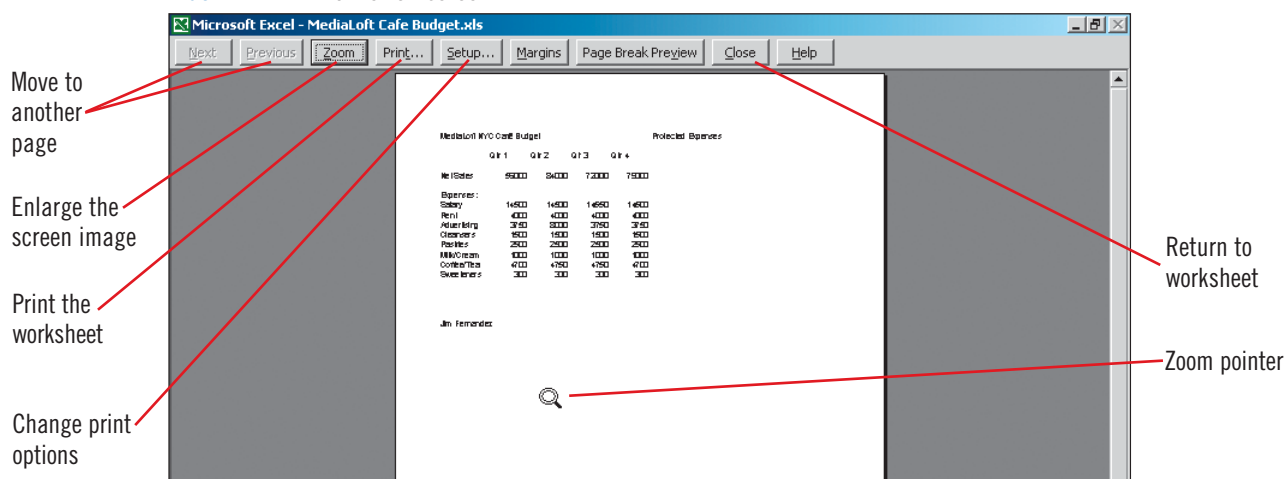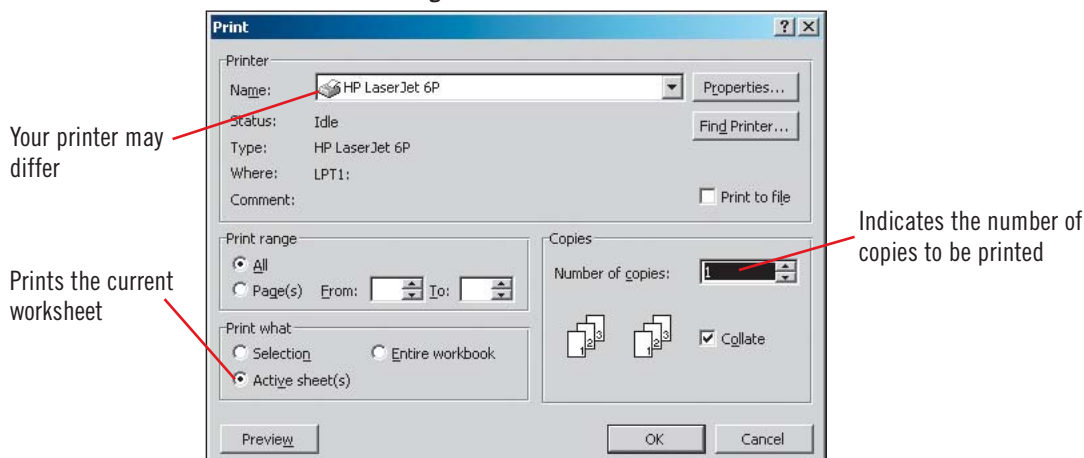| before you print	recommendation
Save your work	Make sure your work is saved
Check the printer	Make sure that the printer is turned on and is online, that it has paper, and that there are no error messages or warning signals
Preview the worksheet	Check the formatted image for page breaks, page setup (vertical or horizontal), and overall appearance of the worksheet
Check the printer selection	Look in the Print dialog box to verify that the correct printer is selected
Check the Print what options	Verify that you are printing either the active sheet, the entire workbook, or just a selected range

FIGURE A-14: Print Preview screen

Move to another page

Enlarge the screen image

Print the worksheet

Change print options

Return to worksheet

Zoom pointer

FIGURE A-15: Print dialog box

Your printer may differ

Prints the current worksheet

Indicates the number of copies to be printed

Using Zoom in Print Preview

When you are in the Print Preview window, you can enlarge the image by clicking the Zoom button. You can also position the Zoom pointer over a specific part of the worksheet page, then click it to view that section of the page. Figure A-16 shows a magnified section of a document. While the image is zoomed in, use the scroll bars to view different sections of the page.

FIGURE A-16: Enlarging the preview using Zoom
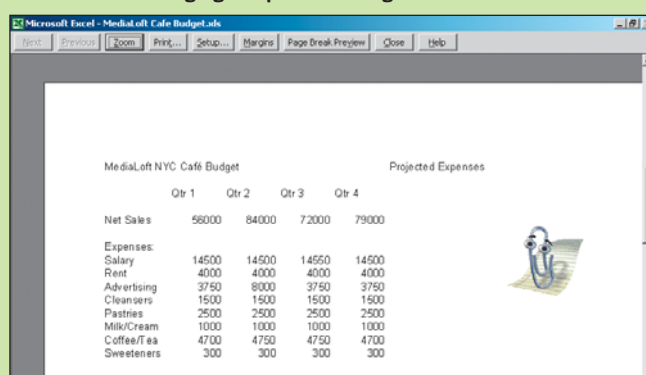
Getting Help

Excel features an extensive **Help system** that gives you immediate access to definitions, steps, explanations, and useful tips. The animated Office Assistant provides help in two ways. You can type a **keyword**, a representative word on which Excel can search your area of interest, or you can access a question and answer format to research your Help topic. The Office Assistant provides **Office Assistant Tips** (indicated by a light bulb) on the current action you are performing. You can click the light bulb to display a dialog box containing relevant choices that you can refer to as you work. In addition, you can press [F1] at any time to get immediate help. Alternately, the **Ask a Question list arrow** on the menu bar is always available for asking questions. You can click the text box and type a question at any time to display related help topics. Questions from your current Excel session are stored, and you can access them at any time by clicking the Ask a Question list arrow, then clicking the question of interest. ✒️ Jim wants to find out more about ranges so he can work more efficiently with them. He asks you to find more information by using the animated Office Assistant.

Steps 1 2 3 4

1. Click the **Microsoft Excel Help button** 🔃 on the Standard toolbar

An Office Assistant dialog balloon opens, asking what you want to do. You can get information by typing a keyword or question in the white box, known as the **query box**. If the text within the query box is highlighted, your text will automatically replace it. The Office Assistant provides help based on the text in the query box.

2. Type **Define a range**

See Figure A-18.

3. Click **Search**

The Office Assistant searches for relevant topics from the Help files in Excel and then displays a list of topics for you to choose from.

4. Click **See More**, then click **Name cells on more than one worksheet**

A Help window containing information about ranges opens, as shown in Figure A-19.

5. Read the text, then click the **Close button** ❎ on the Help window title bar

The Help window closes.

6. Click the Microsoft Excel button on the taskbar to display it, if necessary.

The Office Assistant is no longer visible on the worksheet. Hiding the Office Assistant does not turn it off; it only hides it temporarily.

CLUES TO USE

Changing the Office Assistant

The default Office Assistant character is Clippit, but there are others from which you can choose. To change the appearance of the Office Assistant, right-click the Office Assistant, then click Options. Click the Gallery tab shown in Figure A-17, click the Back and Next buttons until you find an Assistant you want to use, then click OK. (You may need to insert your Microsoft Office CD to perform this task.) Each Office Assistant character makes its own unique sounds. Animate any assistant by right-clicking it, then clicking Animate!

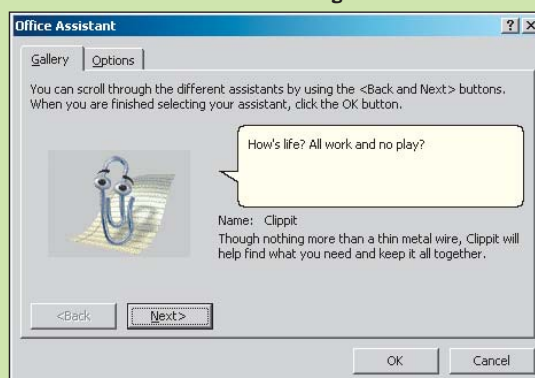**FIGURE A-17:** Office Assistant dialog box

FIGURE A-18: Office Assistant

Ask a Question list arrow

Office Assistant on your screen may offer a list of options to choose from

Query box

Click to close the dialog balloon

FIGURE A-19: Help window

Your topic list may differ

Click to print a topic

Your Help window may be wider or narrower

Excel 2002
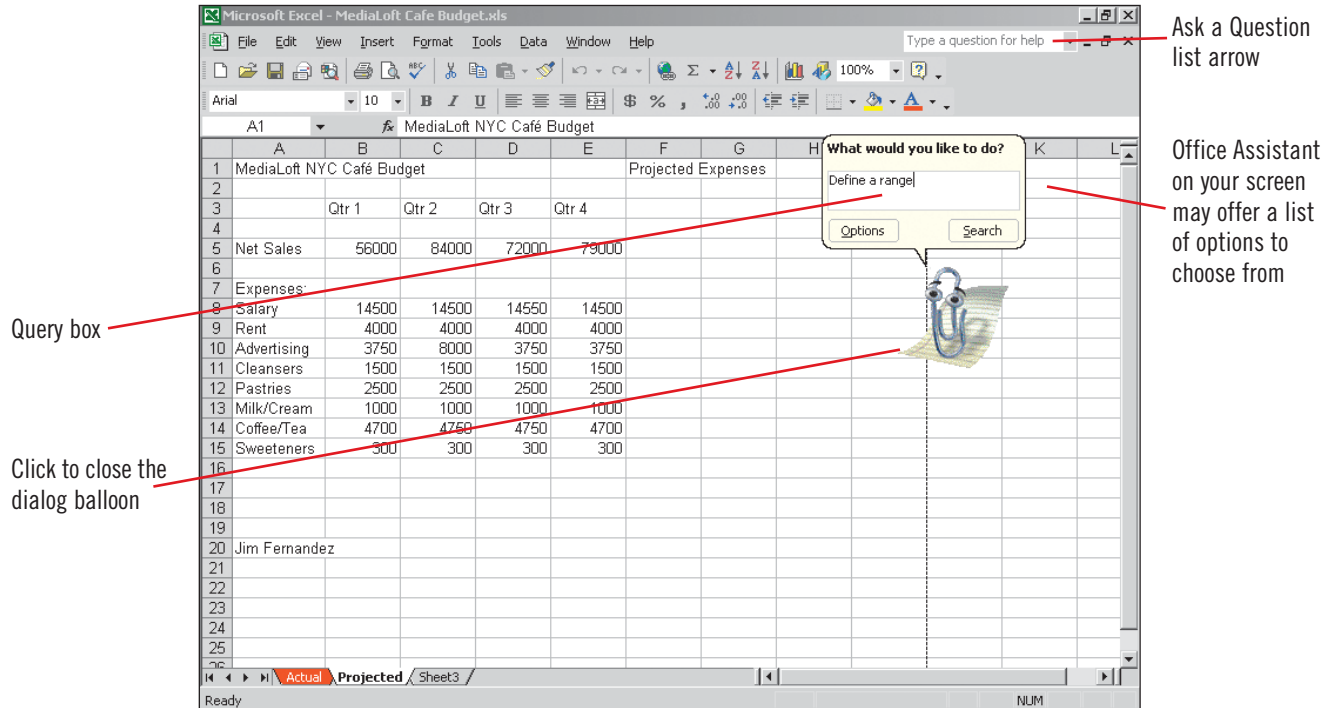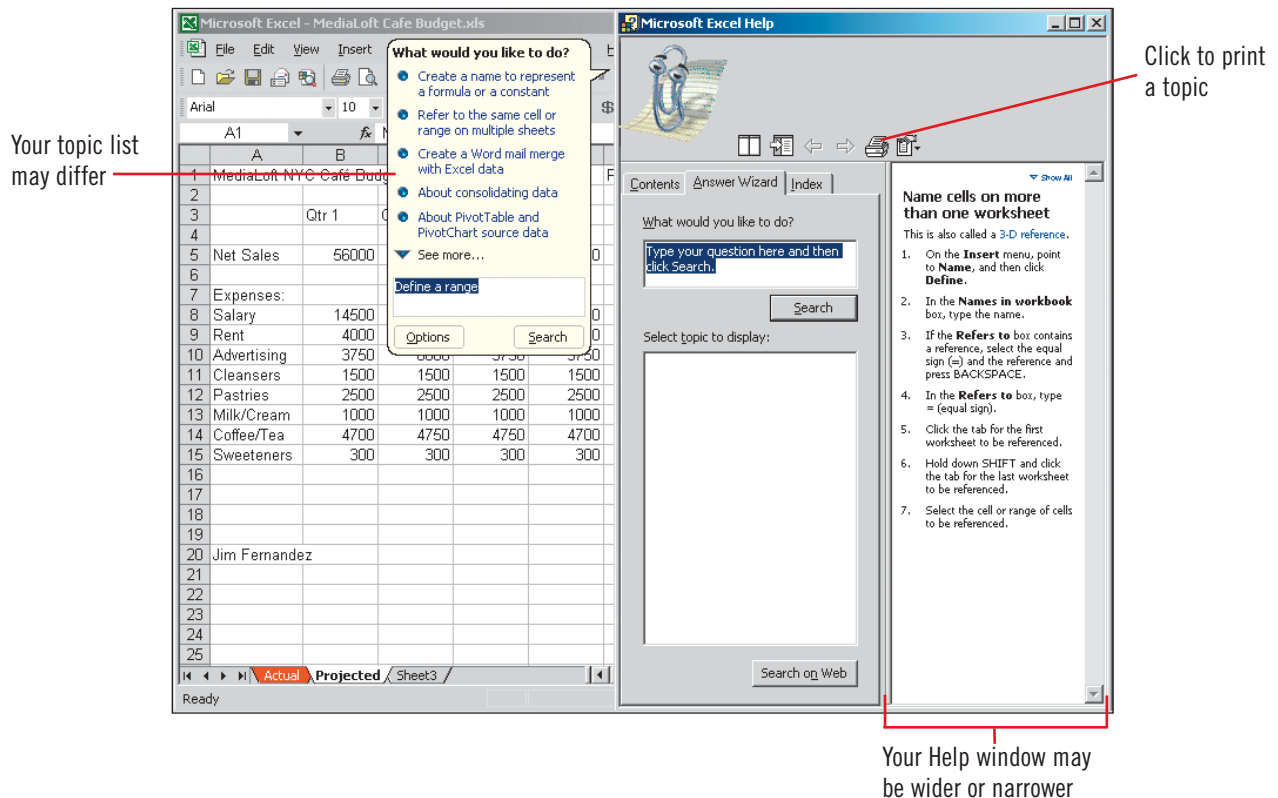
Closing a Workbook and Exiting Excel

When you have finished working, you need to save the workbook file and close it. When you have completed all your work in Excel you need to exit the program. You can exit Excel by clicking Exit on the File menu. ✏️ Jim has completed his work on the MediaLoft Café budget. He wants you to close the workbook and then exit Excel.

Steps 123 4

1. Click **File** on the menu bar

The File menu opens. See Figure A-20.

2. Click **Close**

Excel closes the workbook, asking if you want to save your changes; if you have made any changes be sure to save them. You could also click the workbook Close button instead of using the File menu.
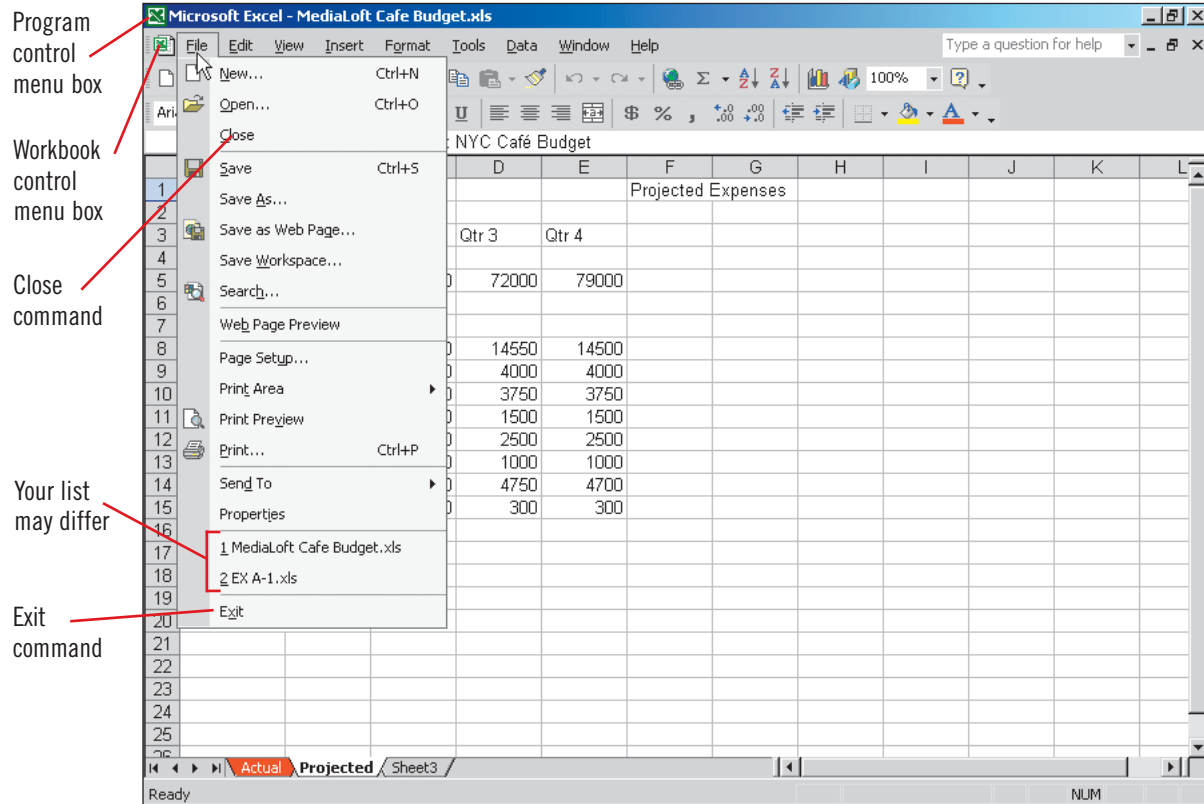
QuickTip

To exit Excel and close several files at once, click Exit on the File menu. Excel will prompt you to save changes to each open workbook before exiting.

3. Click **File** on the menu bar, then click **Exit**

You could also click the program Close button to exit the program. Excel closes and you return to the desktop.

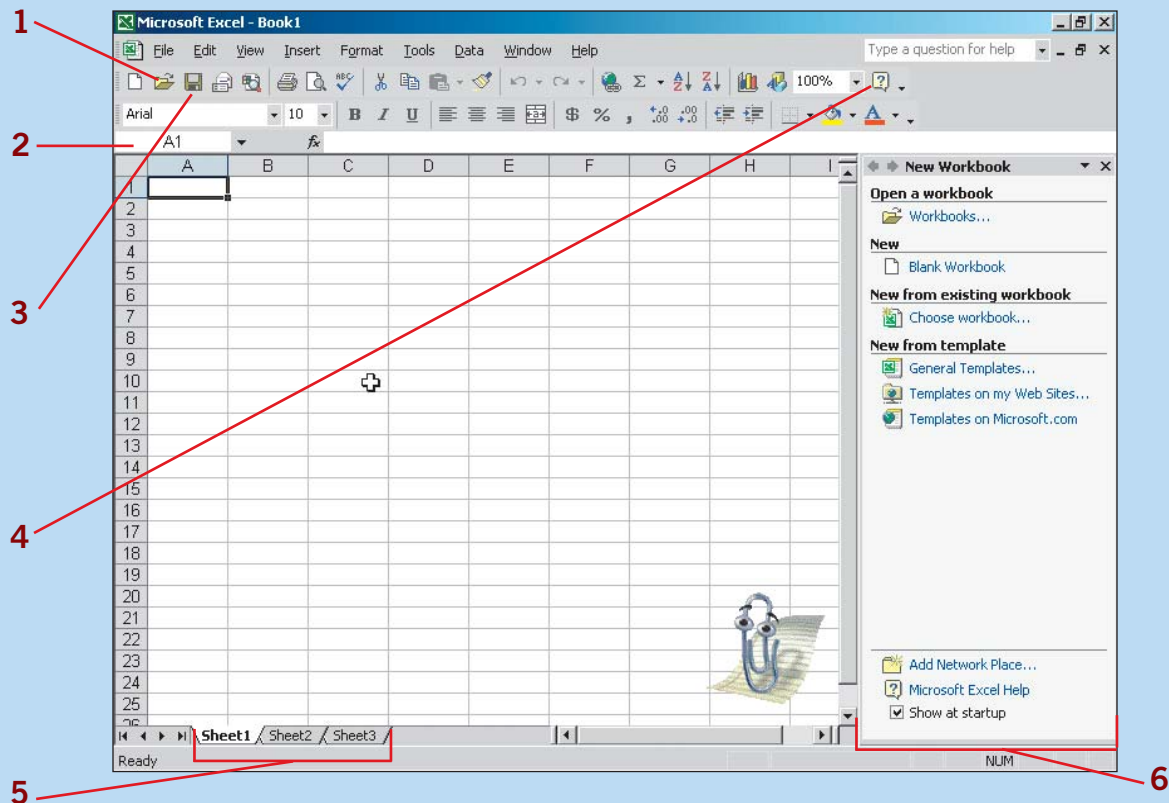**FIGURE A-20:** Closing a workbook using the File menu

Program control menu box

Workbook control menu box

Close command

Your list may differ

Exit command

Excel 2002

Practice

► Concepts Review

Label the elements of the Excel worksheet window shown in Figure A-21.

Match each term with the statement that describes it.

7. Cell pointer
8. Formula bar
9. Worksheet window
10. Name box
11. Cell
12. Workbook

a. Area that contains a grid of columns and rows
b. The intersection of a column and row
c. Allows you to enter or edit worksheet data
d. Collection of worksheets
e. Rectangle indicating the active cell
f. Displays the active cell address

Select the best answer from the list of choices.

13. An electronic spreadsheet can perform all of the following tasks, except:
    a. Display information visually.
    b. Calculate data accurately.
    c. Plan worksheet objectives.
    d. Recalculate updated information.

14. Each of the following is true about labels, except:
    a. They are left-aligned by default.
    b. They are not used in calculations.
    c. They are right-aligned by default.
    d. They can include numerical information.

15. Each of the following is true about values, except:
  a. They can include labels.
  b. They are right-aligned by default.
  c. They are used in calculations.
  d. They can include formulas.

16. What symbol is typed before a number to make the number a label?
  a. "
  b. !
  c. '
  d. ;

17. You can get Excel Help in any of the following ways, except:
  a. Clicking Help on the menu bar, then clicking Microsoft Excel Help.
  b. Pressing [F1].
  c. Clicking 🔲.
  d. Minimizing the program window.

18. The following key(s) can be used to confirm cell entries, except:
  a. [Enter].
  b. [Tab].
  c. [Esc].
  d. [Ctrl][Enter].

19. Which button is used to preview a worksheet?
  a. 🔲
  b. 🔲
  c. 🔲
  d. 🔲

20. Which feature is used to enlarge a Print Preview view?
  a. Magnify
  b. Enlarge
  c. Amplify
  d. Zoom

21. Each of the following is true about the Office Assistant, except:
  a. It provides tips based on your work habits.
  b. It provides help using a question-and-answer format.
  c. You can change the appearance of the Office Assistant.
  d. It can complete certain tasks for you.

▶ Skills Review

1. Start Excel 2002.
  a. Point to **Programs** in the Start menu.
  b. Click the **Microsoft Excel** program icon.
  c. In what area of the Start menu are all the programs on your computer located?
  d. What appears when Excel opens?

2. Open and save a workbook.
  a. Open the workbook EX A-2 from the drive and folder where your Project Files are located.
  b. Save the workbook as **MediaLoft Toronto Cafe** using the Save As command on the File menu; use the New Folder button to save it in a new folder called **Toronto** in the drive and folder where your Project Files are located.
  c. Close the file.
  d. Open it again from the new folder you created.
  e. Open a workbook based on the Balance Sheet template: Display the task pane, select General Templates, display the Spreadsheet Solutions tab, then double-click Balance Sheet.
  f. Save the workbook as **MediaLoft Balance Sheet** in the drive and folder where your Project Files are stored, then close the workbook.

TABLE-4: MediaLoft Toronto Café

	On-Hand	Cost Each	Sale Price
Water	32	9.57	
Coffee	52	13.71	
Bread	36	15.22	
Muffins	25	16.99	
Sweets	43	11.72	
Sodas	52	9.61	

Excel 2002

3. **Enter labels and values.**
   a. Enter the necessary labels shown in Table A-4.
   b. Enter the values shown in Table A-4.
   c. Clear the contents of cell A9 using the Edit menu, then type **Tea** in cell A9.
   d. Save the workbook using the Save button.

4. **Name and move a sheet.**
   a. Name the Sheet1 tab **Inventory**, then name the Sheet2 tab **Sales**.
   b. Move the Inventory sheet so it comes after the Sales sheet.
   c. Change the tab color of the Inventory sheet to yellow (third column, fifth row).
   d. Change the tab color of the Sales sheet to aqua (fifth column, fourth row).
   e. Save the workbook.

5. **Preview and print a worksheet.**
   a. Make the Inventory sheet active.
   b. View it in Print Preview.
   c. Use the Zoom button to get a better look at your worksheet.
   d. Add your name to cell A11, then print one copy of the worksheet.

6. **Get Help.**
   a. Display the Office Assistant if it is not already displayed.
   b. Ask the Office Assistant for information about creating a formula.
   c. Print the information offered by the Office Assistant, using the Print button in the Help window.
   d. Close the Help window.

7. **Close a workbook and exit Excel.**
   a. Close the file using the Close command.
   b. If asked if you want to save the worksheet, click **No**.
   c. Exit Excel.

▶ Independent Challenge 1

The Excel Help feature provides definitions, explanations, procedures, and other helpful information. It also provides examples and demonstrations to show you how Excel features work. Topics include elements such as the active cell, status bar, buttons, and dialog boxes, as well as detailed information about Excel commands and options.

   a. Start Excel and open a new workbook using the New Workbook task pane.
   b. Click the **Office Assistant**; display it if necessary using the Show Office Assistant command on the Help menu.
   c. Type a question that will give you information about opening and saving a workbook. (*Hint*: You may have to ask the Office Assistant more than one question.)
   d. Print the information, close the Help window, then exit Excel.

▶ Independent Challenge 2

Spreadsheet software has many uses that can affect the way people work. The beginning of this unit discusses some examples of people using Excel. Use your own personal or business experiences to come up with five examples of how Excel could be used in a business setting.

   a. Start Excel.
   b. Write down five business tasks that you could complete more efficiently by using an Excel worksheet.
   c. Sketch a sample of each worksheet. See Table A-5, a sample payroll worksheet, as a guide.
   d. Open a new workbook and save it as **Sample Payroll** in the drive and folder where your Project Files are stored.

e. Give your worksheet a title in cell A1, then type your name in cell B1.

f. Enter the labels shown in Table A-5. Enter Hours Worked in column C and Hourly Wage in Column E.

g. Enter sample data for Hours Worked and Hourly Wage in the worksheet.

h. Save your work, then preview and print the worksheet.

i. Close the worksheet and exit Excel.

TABLE A-5: Sample payroll

Employee Name	Hours Worked	Hourly Wage
Dale Havorford		
Chris Wong		
Sharon Armenta		
Belinda Swanson		
Total		

► Independent Challenge 3

You are the office manager for Christine's Car Parts, a small auto parts supplier. Although the company is just three years old, it is expanding rapidly, and you are continually looking for ways to make your job easier. Last year you began using Excel to manage and maintain data on inventory and sales, which has greatly helped you to track information accurately and efficiently. The owner of the company has just approved your request to hire an assistant, who will be starting work in a week. You want to create a short training document that acquaints your new assistant with basic Excel skills.

a. Start Excel.

b. Create a new workbook and save it as **Training Workbook** in the drive and folder where your Project Files are located.

c. Enter a title for the worksheet in cell A1.

d. Make up and enter the values and labels for a sample spreadsheet. Make sure you have labels in column A.

e. Enter your name in cell D1.

f. Change the name of Sheet1 to Sample Data, then change the tab color of the Sample Data to another color.

g. Preview the worksheet, then print it.

h. Open a workbook based on a template from the Spreadsheet Solutions tab in the Templates dialog box. (You may need to insert your Office CD in order to do this.)

i. Save the workbook as **Template Sample**, then close the files and exit Excel.

e Independent Challenge 4

You can use the World Wide Web to help make informed purchasing decisions. Your supervisor has just given you approval for buying a new computer. While cost is not a limiting factor, you do need to provide a list of hardware and software requirements. You can use data found on the World Wide Web and use Excel to create a worksheet that details your purchase decision.

a. Connect to the Internet, then go to the CNET site at computers.com.

b. Use any of the links to locate information about the type of computer you want to purchase.

c. Locate data for the type of system you want using at least two vendors from within this site. When you find systems that meet your needs, print out the information. Be sure to identify each system's key features, such as the processor chip, hard drive capacity, RAM, and monitor size.

d. When you are finished gathering data, disconnect from the Internet.

e. Start Excel, open a new workbook and save it in the drive and folder where your Project Files are stored as **New Computer Data**.

f. Enter the manufacturers' names in columns and computer features (RAM, etc.) in rows. List the systems you found through your research, including the features you want (e.g., CD-ROM drive, etc.) and the cost for each system.

g. List the tax and shipping costs the manufacturer charges.

h. Indicate on the worksheet your final purchase decision by including descriptive text in a prominent cell. Enter your name in one of the cells.

i. Save, preview, and then print your worksheet.

j. Close the file and exit Excel.

▶ **Visual Workshop**

Create a worksheet similar to Figure A-22 using the skills you learned in this unit. Save the workbook as **Carrie's Camera and Darkroom** to the drive and folder where your Project Files are stored. Type your name in cell A11, then preview and print the worksheet.

FIGURE A-22

	A	B	C	D	E
1	Carrie's Camera and Darkroom				
2					
3	Quarterly Sales				
4					
5		Quarter 1	Quarter 2	Quarter 3	Quarter 4
6	Camera	47213	52669	53074	57221
7	Supplies	20201	20761	23421	22049
8	Film	1069	1264	1202	1250
9	Gadgets	983	1066	1146	1608
10					
11					